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Documents Overview

Documents provides a sophisticated knowledge management solution to store and manage the critical information needed in critical situations. Through this system, you can upload electronic files, provide links to intranet or internet applications, or simply load content into the database. All data loaded is tagged, categorized and stored in custom folders for easy retrieval and searching.

Documents			Filter	Add	Share	
Name ↑	Date	Actions				
Document 1	09/24/2018 10:54:00 AM	 				
Document 2	09/24/2018 02:00:00 PM	 				
Page size 10 ▾			« < Page 1 of 1 > »			Displaying 1 - 2 of 2

Add a Document

1. To add a document, click Documents in the navigation bar, then click Add.
2. Enter a name and author for the document.

Documents

General

Name:

Author:

Folder:

Documents

 [Choose Folder](#)

Publish Date:

[Set to Now](#)

9/24/2018

AT:

2

:

07

PM

Lead In:

Description:

Notes:

Additional Information

+

Add & Exit

Add & Continue

Cancel

3. If required, choose a new folder for the document.
4. Enter a publishing time and date.
5. If required, enter a lead in, description, and/or notes.
6. Enter data in any custom fields in the Additional Information section as needed.
7. Click Add & Continue to save your changes and view additional options.

View, Filter & Sort Documents

To view an existing document, click the Documents icon in the navigation bar, then click the  icon in the Actions column. To edit the record, click the  icon.

Events

Filter

Add



Event Name	Active	Status	Event Date ↓	Interruption Level	Severity Level	Actions
Plan 1	False	Active	09/20/2018 12:23:34 PM	Minor	Minor	  
Plan 1	False	Active	09/20/2018 11:42:57 AM	Minor	Minor	  

Page size

10

<< < Page

1

 of 1 > >>

Displaying 1 - 2 of 2

To filter the records by folder, click Filter, then select a folder.

Filter By Folder



 New Org

  Documents

  Corporate Facts

  Policies

  Regulations

Filter

To sort the records, click the column headers.

Document Files

1. To upload a file to a document record, click Documents in the navigation bar, then open the record.
2. Click the Files tab.

Documents

General **Files** Relationships Categories Shares Properties

Browse for a File to Upload:

Choose File

No file chosen

Upload

No Files have been Uploaded

3. Click Choose File, locate the file you want to upload, then click Open.
4. Click Upload.

Documents

General **Files** Relationships Categories Shares Properties

File: Document.docx successfully attached

Browse for a File to Upload:

Choose File

No file chosen

Upload

File Name	Type	Actions
Document.docx	application	  

Document Relationships

You can create relationships between items and any record type (except for [News & Updates](#)) through the **Relationships** tab of that record.

For more relationship features, see the [Relationship Mapping](#) tool in Administration, the [Relationship Editor](#) form type, or the [relationship builder](#) tool on custom forms.

To add a relationship from the Relationships tab of a record:

1. Navigate to the applicable organization and open the record.
2. Click the **Relationships** tab.
3. Select a relationship type from the dropdown menu in the **Relationships** column. Relationship types are configured in the [Referential Data](#) settings.
4. Click the textbox on the left of the top row and enter keywords to search for and select an object or click the  icon to the right of the text field to display the **Association Tree**, then select an object.

Contacts

General Contact-Methods Account Photo **Relationships** Shares Forms Locations Properties

Modeler

Associated Items

Title ↑	Relationships ↕	Title	Actions
Jane Doe	Not Specified ▾	John Doe 	
Activate Plan	Not Specified ▾	Jane Doe	  
Activate Plan	Not Specified ▾	Jane Doe	  
Jane Doe	Not Specified ▾	Activate Plan	  

Page Size 10 ▾

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Displaying 1-3 of 3

A new relationship in the relationships tab of an object.

5. Click the  icon to save the relationship.

6. Click the  icons to swap the objects in the relationship, delete the relationship, or view more information.

Document Categories

The Categories tab allows you to index the document record with categories and additional searching capabilities.

1. To select a category for a document, click Documents in the navigation bar, then open the document record.
2. Click the Categories tab.
3. Click a category to select it and add it to the Current Categories section. The available categories are configured in the [Referential Data](#) settings.

Documents

[General](#) [Files](#) [Relationships](#) **[Categories](#)** [Shares](#) [Properties](#)

Available Categories

- 💡 General
- 💡 Miscellaneous
- 💡 Test
- 💡 Weather

Browse Filter - Results

Filter

Reset

Current Categories

- 🚫 Miscellaneous

Document Shares

Contacts, Documents, Resources, and Forms can be shared across business units. By sharing, you are creating a link to the original source record. This does not duplicate the record, so any changes made will impact all shares. To share a contact record, click the appropriate icon in the navigation bar, then click Share to select which record will be shared and its destination.

Manage Shared Documents

Selection

- Backups
- Business Group
- Corp
- DD
- Enterprise Data
- Enterprise DR Exercise
- KW
- New Org
 - Documents
 - Events
 - Plans
- NYDOH

Browse

Filter - Results

Filter

Reset

Share

Destination

- New Org
 - Documents
 - Events
 - Plans
 - Plan 1
 - Documents
 - Plan 2

Browse

Filter - Results

Filter

Reset

Local Folder Shares

No items to display

To view where the record is shared, as well as the subscription categories the record is subscribed to, if any, for each folder, click the Shares tab in the record. Click the pencil icon to edit the share or the delete icon to remove it.

Contacts

General Contact-Methods Account Photo Relationships **Shares** Forms Locations Properties

Item ↓	Original Location	Shared Location	Subscription Category	Action
Jane Doe	Contacts	Contacts		

Page size

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Displaying 1 - 1 of 1

Document Properties

The Properties tab of a record allows you to select an account or role as an owner of the record, review system information, schedule reviews, view existing schedules, pending reviews, and the record's history.

Contacts

General Contact-Methods Account Photo Relationships Shares Forms Locations **Properties**

Ownership

Owner: No Owner Specified

[Choose Owner](#)

Added By: 

Added Date: 09/17/2018 05:13:08 PM

Last Updated By: 

Last Updated Date: 09/17/2018 05:13:08 PM

Reviews

New Schedule: Title:

Type:

Trigger: ☒ Schedule ☐ Dependent

Due Every:

Start Date: [Set to Now](#)

AT: :

Assigned To: 

[Set Assignment](#)

☐ Automatically Notify Assignee When Assigned?

